

CONSERVATORSHIP

THE LAW DOES NOT ALLOW PERSONNEL OF THE OFFICE OF THE CLERK OF THE SUPERIOR COURT TO ASSIST IN THE SELECTION OR PREPARATION OF ANY FORMS OR TO ADVISE YOU AS TO ANY PROCEDURE TO BE FOLLOWED IN OBTAINING A JUDGMENT

Attached are the forms usually necessary for a petition for appointment of probate conservator.

Form #	Title	Number of Copies
GC-310	Petition for Appointment of Probate Conservator	1
GC-020	Notice of Hearing Guardianship or Conservatorship	1
GC-320	Citation for Conservatorship	1
GC-330	Order Appointing Court Investigator	1
Clerk-212	Notice to Court of Address – Conservatorship or Guardianship Proceeding	1
GC-335	Capacity Declaration - Conservatorship	1
GC-348	Duties of Conservator (and acknowledgement of Receipt of Handbook)	1
GC-312	Confidential Supplemental Information	1
GC-314	Confidential Conservator Screening Form	1
GC-110	Petition for Appointment of Temporary Guardian or Conservator	1
GC-140	Order Appointing Temporary Guardian or Conservator	1
GC-150	Letters of Temporary Guardianship or Conservatorship	1
GC-340	Order Appointing Probate Conservator	1
GC-350	Letters of Conservatorship	1
GC-040	Inventory and Appraisal	1

ALL FORMS MUST BE TYPED OR LEGIBLY PRINTED IN BLACK INK AND SIGNED.

Complete all forms in their entirety, i.e., all boxes checked as applicable; attachments attached, if applicable; and “NONE”, “NOT APPLICABLE”, or “UNKNOWN” typed in if required.

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar number, and address): TELEPHONE NO.: _____ FAX NO. (Optional): _____ E-MAIL ADDRESS (Optional): _____ ATTORNEY FOR (Name): _____	FOR COURT USE ONLY		
SUPERIOR COURT OF CALIFORNIA, COUNTY OF _____ STREET ADDRESS: _____ MAILING ADDRESS: _____ CITY AND ZIP CODE: _____ BRANCH NAME: _____	CASE NUMBER: _____ <table style="width: 100%; border: none;"> <tr> <td style="border: none; width: 80%;">HEARING DATE AND TIME: _____</td> <td style="border: none; width: 20%;">DEPT.: _____</td> </tr> </table>	HEARING DATE AND TIME: _____	DEPT.: _____
HEARING DATE AND TIME: _____		DEPT.: _____	
CONSERVATORSHIP OF _____ (Name): _____ <div style="text-align: right;">(PROPOSED) CONSERVATEE</div>			
PETITION FOR APPOINTMENT OF <input type="checkbox"/> SUCCESSOR PROBATE CONSERVATOR OF THE <input type="checkbox"/> PERSON <input type="checkbox"/> ESTATE <input type="checkbox"/> Limited Conservatorship			

1. **Petitioner (name):**

requests that

- a. (Name): _____
 (Address): _____

(Telephone): _____

be appointed ☐ successor ☐ conservator ☐ limited conservator
 of the PERSON of the (proposed) conservatee and Letters issue upon qualification.

- b. (Name): _____
 (Address): _____

(Telephone): _____

be appointed ☐ successor ☐ conservator ☐ limited conservator
 of the ESTATE of the (proposed) conservatee and Letters issue upon qualification.

- c. (1) ☐ bond not be required ☐ because the proposed ☐ successor conservator is a corporate fiduciary or an exempt government agency. ☐ for the reasons stated in Attachment 1c.
- (2) ☐ bond be fixed at: \$ _____ to be furnished by an authorized surety company or as otherwise provided by law. (Specify reasons in Attachment 1c if the amount is different from the minimum required by Probate Code section 2320.)
- (3) ☐ \$ _____ in deposits in a blocked account be allowed. Receipts will be filed. (Specify institution and location): _____
- d. ☐ orders authorizing independent exercise of powers under Probate Code section 2590 be granted. Granting the proposed ☐ successor conservator of the estate powers to be exercised independently under Probate Code section 2590 would be to the advantage and benefit and in the best interest of the conservatorship estate. (Specify orders, powers, and reasons in Attachment 1d.)
- e. ☐ orders relating to the capacity of the (proposed) conservatee under Probate Code section 1873 or 1901 be granted. (Specify orders, facts, and reasons in Attachment 1e.)
- f. ☐ orders relating to the powers and duties of the proposed ☐ successor conservator of the person under Probate Code sections 2351–2358 be granted. (Specify orders, facts, and reasons in Attachment 1f.)
- g. ☐ the (proposed) conservatee be adjudged to lack the capacity to give informed consent for medical treatment or healing by prayer and that the proposed ☐ successor conservator of the person be granted the powers specified in Probate Code section 2355. (Complete item 9 on page 5.)

Do NOT use this form for a temporary conservatorship.

CONSERVATORSHIP OF (Name): <div style="border-bottom: 1px solid black; height: 1.2em; width: 100%;"></div>	CASE NUMBER: <div style="border-bottom: 1px solid black; height: 1.2em; width: 100%;"></div>
CONSERVATEE	

1. h. ☐ (for limited conservatorship only) orders relating to the powers and duties of the proposed ☐ successor * limited conservator of the person under Probate Code section 2351.5 be granted. (Specify orders, powers, and duties in Attachment 1h and complete item 1j.)
- i. ☐ (for limited conservatorship only) orders relating to the powers and duties of the proposed ☐ successor * limited conservator of the estate under Probate Code section 1830(b) be granted. (Specify orders, powers, and duties in Attachment 1i and complete item 1j.)
- j. ☐ (for limited conservatorship only) orders limiting the civil and legal rights of the (proposed) limited conservatee be granted. (Specify limitations in Attachment 1j.)
- k. ☐ orders related to dementia placement or treatment as specified in the *Attachment Requesting Special Orders Regarding Dementia* (form GC-313) under Probate Code section 2356.5 be granted. A *Capacity Declaration—Conservatorship* (form GC-335) and *Dementia Attachment to Capacity Declaration—Conservatorship* (form GC-335A), executed by a licensed physician or by a licensed psychologist acting within the scope of his or her licensure with at least two years experience diagnosing dementia, ☐ are filed herewith. ☐ will be filed before the hearing. ☐ (appointment of successor conservator only) will not be filed because an order relating to dementia placement or treatment was filed on (date): . That order has neither expired by its terms nor been revoked.
- l. ☐ other orders be granted. (Specify in Attachment 1l.)
2. **(Proposed) conservatee** is (name):
(Present address):

(Telephone):
3. a. ☐ **Jurisdictional facts** (initial appointment only): The proposed conservatee has no conservator in California and is a
- (1) ☐ resident of California and
- (a) ☐ a resident of this county.
- (b) ☐ not a resident of this county, but commencement of the conservatorship in this county is in the best interests of the proposed conservatee. (Specify reasons in Attachment 3a.)
- (2) ☐ nonresident of California but
- (a) ☐ is temporarily living in this county, or
- (b) ☐ has property in this county, or
- (c) ☐ commencement of the conservatorship in this county is in the best interest of the proposed conservatee. (Specify reasons in Attachment 3a.)
- b. **Petitioner**
- (1) ☐ is ☐ is not a **creditor** or an agent of a creditor of the (proposed) conservatee.
- (2) ☐ is ☐ is not a **debtor** or an agent of a debtor of the (proposed) conservatee.
- c. **Proposed** ☐ **successor conservator** is (check all that apply):
- (1) ☐ a nominee. (Affix nomination as Attachment 3c.)
- (2) ☐ the spouse of the (proposed) conservatee.
- (3) ☐ the domestic partner or former domestic partner of the (proposed) conservatee.
- (4) ☐ a relative of the (proposed) conservatee as (specify relationship):
- (5) ☐ a bank ☐ other entity authorized to conduct the business of a trust company.
- (6) ☐ a nonprofit charitable corporation that meets the requirements of Probate Code section 2104.
- (7) ☐ a private professional conservator, as defined in Probate Code section 2341, who has filed with the court the information statement required by Probate Code section 2342.
- (8) (a) ☐ registered with the Statewide Registry of Private Conservators, Guardians, and Trustees maintained by the California Department of Justice under Probate Code sections 2850–2855. The current registration declaration on file will expire on (date):
- (b) ☐ exempt from statewide registration under Probate Code section (specify):
(Explain basis for exemption in Attachment 3c.)
- (9) ☐ other (specify):

* See Item 5b on page 3.

CONSERVATORSHIP OF (Name): <div style="text-align: right; padding-top: 10px;">CONSERVATEE</div>	CASE NUMBER:
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3. d. **Petitioner** is

- (1) ☐ the (proposed) conservatee.
 (2) ☐ the spouse of the (proposed) conservatee.
 (3) ☐ the domestic partner or former domestic partner of the (proposed) conservatee.
 (4) ☐ a relative of the (proposed) conservatee as *(specify relationship)*:
 (5) ☐ a bank ☐ other entity authorized to conduct the business of a trust company.
 (6) ☐ a state or local public entity, officer, or employee.
 (7) ☐ an interested person or friend of the (proposed) conservatee.
 (8) ☐ the proposed ☐ successor conservator.
 (9) ☐ the guardian of the proposed conservatee.

e. **Character and estimated value of the property of the estate** *(complete items (1) or (2) and (3), (4), and (5))*:

- (1) ☐ *(For appointment of successor conservator only, if complete Inventory and Appraisal filed by predecessor):*
 Personal property: \$ _____, per Inventory and Appraisal filed in this proceeding on
(specify dates of filing of all inventories and appraisals):

(2) ☐ Estimated value of personal property: \$ _____

(3) Annual gross income from

- (a) real property: \$ _____
 (b) personal property: \$ _____
 (c) pensions: \$ _____
 (d) wages: \$ _____
 (e) public assistance benefits: \$ _____
 (f) other: \$ _____

(4) **Total** of (1) or (2) and (3): \$ _____

(5) Real property: \$ _____

- (a) ☐ per Inventory and Appraisal identified in item (1).
 (b) ☐ estimated value.

4. **(Proposed) conservatee**

- a. ☐ is ☐ is not a patient in or on leave of absence from a state institution under the jurisdiction of the California Department of Mental Health or the California Department of Developmental Services *(specify state institution)*:

 b. ☐ is receiving or entitled to receive ☐ is neither receiving nor entitled to receive benefits from the U.S. Department of Veterans Affairs *(estimate amount of monthly benefit payable)*: \$ _____
 c. ☐ is ☐ is not able to complete an affidavit of voter registration.

5. a. ☐ **Proposed conservatee** *(initial appointment of conservator only)*

- (1) ☐ is an adult.
 (2) ☐ will be an adult on the effective date of the order *(date)*:
 (3) ☐ is a married minor.
 (4) ☐ is a minor whose marriage has been dissolved.

b. ☐ **Vacancy in office of conservator** *(appointment of successor conservator only. A petition for appointment of a limited conservator after the death of a predecessor is a petition for initial appointment. (Prob. Code, § 1860.5(a)(1).)*

There is a vacancy in the office of conservator of the ☐ person ☐ estate for the reasons
☐ specified in Attachment 5b. ☐ specified below.

CONSERVATORSHIP OF <i>(Name)</i> : <div style="text-align: right;">CONSERVATEE</div>	CASE NUMBER:
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5. c. **(Proposed) conservatee** requires a conservator and is

- (1) ☐ unable to properly provide for his or her personal needs for physical health, food, clothing, or shelter.
 Supporting facts are ☐ specified in Attachment 5c(1) ☐ as follows:

- (2) ☐ substantially unable to manage his or her financial resources or to resist fraud or undue influence.
 Supporting facts are ☐ specified in Attachment 5c(2) ☐ as follows:

CONSERVATEE

- GC-310 [Rev. January 1, 2006]

CONSERVATEE

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NOTE: *

A copy of this *Notice of Hearing—Guardianship or Conservatorship* ("Notice") must be "served" on—delivered to—each person who has the right under the law to be notified of the date, time, place, and purpose of a court hearing in a guardianship or conservatorship. Copies of this Notice may be served by mail in most situations. In a guardianship, however, copies of this Notice must sometimes be personally served on certain persons; and copies of this Notice may be personally served instead of served by mail in both guardianships and conservatorships. The petitioner (the person who requested the court hearing) **may not personally perform either service by mail or personal service**, but must show the court that copies of this Notice have been served in a way the law allows. The petitioner does this by arranging for someone else to perform the service and complete and sign a proof of service, which the petitioner then files with the original Notice.

This page contains a proof of service that may be used only to show service by mail. To show personal service, each person who performs the service must complete and sign a proof of personal service, and each signed copy of that proof of service must be attached to this Notice when it is filed with the court.. You may use form GC-020(P) to show personal service of this Notice.

PROOF OF SERVICE BY MAIL

- I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

(TYPE OR PRINT NAME OF PERSON COMPLETING THIS FORM)

▶

(SIGNATURE OF PERSON COMPLETING THIS FORM)

NAME AND ADDRESS OF EACH PERSON TO WHOM NOTICE WAS MAILED

Address (number, street, city, state, and zip code)

1.		
2.		
3.		
4.		

☐ Continued on an attachment. (You may use form DE-120(MA)/GC-020(MA) to show additional persons served.)

a. Date: _____ Time: _____ Dept.: _____ Room: _____

(SEAL)



ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, state bar number, and address):		TELEPHONE AND FAX NOS.:	FOR COURT USE ONLY
ATTORNEY FOR (Name):			
SUPERIOR COURT OF CALIFORNIA, COUNTY OF STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:			
CONSERVATORSHIP OF THE <input type="checkbox"/> PERSON <input type="checkbox"/> ESTATE OF (Name): <input type="checkbox"/> CONSERVATEE <input type="checkbox"/> PROPOSED CONSERVATEE			
ORDER APPOINTING COURT INVESTIGATOR <input type="checkbox"/> Conservatorship <input type="checkbox"/> Limited Conservatorship			CASE NUMBER:

TO (name):

You are hereby appointed Court Investigator in the matter entitled above.

1. ☐ **Prior to appointment of a conservator** YOU ARE DIRECTED TO
 - a. personally interview and inform the proposed conservatee of the contents of the citation, the nature, purpose, and effect of the proceedings, and of the right to oppose the proceeding, attend the hearing, have the matter tried by jury, be represented by counsel, and have legal counsel appointed by the court if unable to retain an attorney.
 - b. determine
 - (1) whether it appears that the proposed conservatee is unable or unwilling to attend the hearing.
 - (2) whether the proposed conservatee wishes to contest the establishment of the conservatorship; and whether the proposed conservatee objects to the proposed conservator, or whether he or she prefers another person to act as conservator.
 - (3) whether the proposed conservatee wishes to be represented by counsel, and if so, whether counsel has been retained, and if not, the name of an attorney the proposed conservatee wishes to retain.
 - (4) whether the proposed conservatee desires the court to appoint legal counsel if the proposed conservatee has not retained an attorney.
 - (5) whether the appointment of legal counsel would be helpful to the resolution of the matter or is necessary to protect the interests of the proposed conservatee if the proposed conservatee does not plan to retain legal counsel and has not requested the court to appoint legal counsel.
 - (6) whether the proposed conservatee is capable of completing an affidavit of voter registration.
 - c. review (i) the allegations of the petition as to why the appointment of a conservator is required and (ii) the statements in the *Confidential Supplemental Information* (form GC-312) and refer to the supplemental information in making your determinations.
 - d. at least five days before the hearing, report your findings in writing to the court, including in your report the proposed conservatee's express communications concerning the following:
 - (1) representation by legal counsel;
 - (2) whether the proposed conservatee is not willing to attend the hearing, does not wish to contest the establishment of the conservatorship, and does not object to the proposed conservator or prefer that another person act as conservator.
 - e. at least five days before the date set for hearing, mail a copy of your report to all of the following:
 - (1) the attorney, if any, for the petitioner;
 - (2) the attorney, if any, for the proposed conservatee;
 - (3) ☐ other persons ordered by the court (specify names and addresses in Attachment 1e).
 - f. ☐ other (specify in Attachment 1f).
2. ☐ **Before the court grants an order relating to medical consent under Probate Code section 1880.**
☐ **Before the court grants an order under Probate Code section 2253 authorizing the temporary conservator to change the residence of the temporary conservatee**
 YOU ARE DIRECTED TO
 - a. personally interview and inform the conservatee of the contents of the petition, the nature, purpose, and effect of the proceedings, and of the right to oppose the petition, attend the hearing, and be represented by legal counsel.

(Continued on reverse)

CONSERVATORSHIP OF (Name): _____	CASE NUMBER: _____
<div style="display: flex; justify-content: space-around; align-items: center;"> <input type="checkbox"/> CONSERVATEE <input type="checkbox"/> PROPOSED CONSERVATEE </div>	

2. b. determine
- (1) whether it appears that the conservatee is unable or unwilling to attend the hearing.
 - (2) whether the conservatee wishes to contest the petition.
 - (3) whether the conservatee wishes to be represented by counsel, and if so, whether counsel has been retained, and if not, the name of an attorney the conservatee wishes to retain.
 - (4) whether the conservatee desires the court to appoint legal counsel if the conservatee has not retained an attorney.
 - (5) whether the appointment of legal counsel would be helpful to the resolution of the matter or is necessary to protect the interests of the conservatee if the conservatee does not plan to retain legal counsel and has not requested the court to appoint legal counsel.
 - (6) *(for change of residence only)* determine whether the proposed change of place of residence is required to prevent irreparable harm to the conservatee and whether no means less restrictive of the conservatee's liberty will suffice to prevent the harm.
- c. at least five days before the hearing on medical consent or at least two days before the hearing on change of residence, report your findings in writing to the court, including in your report the conservatee's express communications concerning representation by legal counsel and whether the conservatee is not willing to attend the hearing and does not wish to contest the petition.
- d. at least five days before the date set for hearing on medical consent or at least two days before the hearing on change of residence, mail a copy of your report to all of the following:
- (1) the attorney, if any, for the petitioner;
 - (2) the attorney, if any, for the conservatee;
 - (3) ☐ other persons ordered by the court *(specify names and addresses in Attachment 2d)*.
- e. ☐ other *(specify in Attachment 2e)*.
3. ☐ **Duties after appointment of conservator.** YOU ARE DIRECTED TO
- a. visit and personally inform the conservatee that he or she is under a conservatorship and of the name of the conservator.
 - b. determine whether the conservatee wishes to petition the court for termination of the conservatorship.
 - c. determine whether the conservatee is still in need of the conservatorship.
 - d. determine whether the conservatee is capable of completing an affidavit of voter registration.
 - e. determine whether the conservator is acting in the best interests of the conservatee.
 - f. inform the court immediately if you are unable at any time to locate the conservatee.
 - g. as may be necessary, visit personally with the conservator and other persons to determine whether the conservator is acting in the best interest of the conservatee.
 - h. ☐ *(if the conservator is authorized to act under Probate Code section 2356.5—dementia treatment or placement)* advise the conservatee specifically that he or she has the right to object to the conservator's powers granted under section 2356.5, to determine whether the powers are warranted, to determine whether the conservatee objects to the conservator's powers under this section, and to determine whether some change in the powers granted under this section is warranted.
 - i. ☐ *(for conservatorships existing on December 31, 1980, in which the conservatee has not been adjudged incompetent)* determine whether an order should be made under Probate Code section 1873 broadening the capacity of the conservatee.
 - j. ☐ determine whether the present condition of the conservatee is such that the terms of the court order under Probate Code sections 1873 or 1901 should be modified or that the order should be revoked.
 - k. ☐ determine whether the conservatee still lacks the capacity to give informed consent for any form of medical treatment.
 - l. ☐ *(for limited conservatorship only)* make a recommendation regarding the continuation or termination of the limited conservatorship.
 - m. mail at the same time your report is certified to the court a copy to the conservator, to the attorneys of record for the conservator and conservatee, and to any other persons as ordered by the court *(specify names and addresses in Attachment 3m)*.
 - n. ☐ other *(specify in Attachment 3n)*.

The visit and investigation under item 3 shall be so conducted that it is completed and your findings are certified in writing to the court not less than 15 days before the expiration of one year from the date the conservator was appointed. Visits and investigations shall be made biennially thereafter, with written findings certified to the court not less than 15 days before the date of biennial court review.

4. Number of pages attached: _____

Date: _____

JUDGE OF THE SUPERIOR COURT
☐ SIGNATURE FOLLOWS LAST ATTACHMENT

Name, Address and Telephone Number of Attorney (s)	For Court Use Only
Attorney for: SUPERIOR COURT OF CALIFORNIA, COUNTY OF MONTEREY 1200 Aguajito Road, Monterey Division Monterey, CA 93940	
<input type="checkbox"/> Conservatorship <input type="checkbox"/> Guardianship of <input type="checkbox"/> Person <input type="checkbox"/> Estate of	
Notice to Court of Addresses Conservatorship/Guardianship Proceeding	Case Number:

Complete and File With Initial Petition, Each Accounting, and When any Party Changes Residence

Hearing Date: _____

I. Present location of (proposed) conservatee/ward (if hospital or other facility, include its name):

 _____ Telephone: _____

D. O. B. _____ Marital Status: _____ Social Security #: _____

Is (proposed) conservatee/ward developmentally disabled? ☐ Yes ☐ No

II. (Proposed) Conservators(s)/Guardians(s):

	Person	Estate
Name:	_____	_____
Address:	_____ _____	_____ _____
Daytime Phone:	_____	_____
Relationship to conservatee/ward:	_____	_____
Attorney:	_____	_____

III. Who should be contacted for further information?

Name: _____ Daytime phone: _____

Address: _____

Dated: _____

Signature

(The reverse side may be used for additional information, if desired.)

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar number, and address): <div style="display: flex; justify-content: space-between;"> <div>TELEPHONE NO.:</div> <div>FAX NO. (Optional):</div> </div> <div style="display: flex; justify-content: space-between;"> <div>E-MAIL ADDRESS (Optional):</div> <div></div> </div> <div style="display: flex; justify-content: space-between;"> <div>ATTORNEY FOR (Name):</div> <div></div> </div>	FOR COURT USE ONLY
SUPERIOR COURT OF CALIFORNIA, COUNTY OF STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:	
CONSERVATORSHIP OF THE <input type="checkbox"/> PERSON <input type="checkbox"/> ESTATE OF (Name): <input type="checkbox"/> CONSERVATEE <input type="checkbox"/> PROPOSED CONSERVATEE	
CAPACITY DECLARATION—CONSERVATORSHIP	CASE NUMBER

TO PHYSICIAN, PSYCHOLOGIST, OR RELIGIOUS HEALING PRACTITIONER

The purpose of this form is to enable the court to determine whether the (proposed) conservatee *(check all that apply)*:

A. ☐ is able to attend a court hearing to determine whether a conservator should be appointed to care for him or her. The court hearing is set for (date): . *(Complete item 5, sign, and file page 1 of this form.)*

B. ☐ has the capacity to give informed consent to medical treatment. *(Complete items 6 through 8, sign page 3, and file pages 1 through 3 of this form.)*

C. ☐ has dementia and, if so, (1) whether he or she needs to be placed in a secured-perimeter residential care facility for the elderly, and (2) whether he or she needs or would benefit from dementia medications. *(Complete items 6 and 8 of this form and form GC-335A; sign and attach form GC-335A. File pages 1 through 3 of this form and form GC-335A.)*

(If more than one item is checked above, sign the last applicable page of this form or form GC-335A if item C is checked. File page 1 through the last applicable page of this form; also file form GC-335A if item C is checked.)

COMPLETE ITEMS 1–4 OF THIS FORM IN ALL CASES.

GENERAL INFORMATION

1. (Name):
2. (Office address and telephone number):
3. I am
 - a. ☐ a California licensed ☐ physician ☐ psychologist acting within the scope of my licensure ☐ with at least two years' experience in diagnosing dementia.
 - b. ☐ an accredited practitioner of a religion whose tenets and practices call for reliance on prayer alone for healing, which religion is adhered to by the (proposed) conservatee. The (proposed) conservatee is under my treatment. *(Religious practitioner may make the determination under item 5 ONLY.)*
4. (Proposed) conservatee (name):
 - a. I last saw the (proposed) conservatee on (date):
 - b. The (proposed) conservatee ☐ is ☐ is NOT a patient under my continuing treatment.

ABILITY TO ATTEND COURT HEARING

5. A court hearing on the petition for appointment of a conservator is set for the date indicated in item A above. *(Complete a or b.)*
 - a. ☐ The proposed conservatee is able to attend the court hearing.
 - b. ☐ Because of medical inability, the proposed conservatee is NOT able to attend the court hearing *(check all items below that apply)*
 - (1) ☐ on the date set *(see date in box in item A above)*.
 - (2) ☐ for the foreseeable future.
 - (3) ☐ until (date):
 - (4) **Supporting facts** *(State facts in the space below or check this box ☐ and state the facts in Attachment 5):*

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.
Date:



(TYPE OR PRINT NAME)

(SIGNATURE OF DECLARANT)

Page 1 of

CONSERVATORSHIP OF THE <input style="width: 30px;" type="checkbox"/> PERSON <input style="width: 30px;" type="checkbox"/> ESTATE OF (Name): <div style="border-bottom: 1px solid black; height: 15px; width: 100%;"></div>	CASE NUMBER: <div style="border-bottom: 1px solid black; height: 15px; width: 100%;"></div>
<input style="width: 30px;" type="checkbox"/> CONSERVATEE <input style="width: 30px;" type="checkbox"/> PROPOSED CONSERVATEE	

6. EVALUATION OF (PROPOSED) CONSERVATEE'S MENTAL FUNCTIONS

Note to practitioner: This form is *not* a rating scale. It is intended to assist you in recording your *impressions* of the (proposed) conservatee's mental abilities. Where appropriate, you may refer to scores on standardized rating instruments.

(Instructions for items 6A–6C): Check the appropriate designation as follows: **a** = no apparent impairment; **b** = moderate impairment; **c** = major impairment; **d** = so impaired as to be incapable of being assessed; **e** = I have no opinion.)

A. Alertness and attention

- (1) Levels of arousal (lethargic, responds only to vigorous and persistent stimulation, stupor)
 a ☐ b ☐ c ☐ d ☐ e ☐
- (2) Orientation (types of orientation impaired)
 a ☐ b ☐ c ☐ d ☐ e ☐ Person
 a ☐ b ☐ c ☐ d ☐ e ☐ Time (day, date, month, season, year)
 a ☐ b ☐ c ☐ d ☐ e ☐ Place (address, town, state)
 a ☐ b ☐ c ☐ d ☐ e ☐ Situation ("Why am I here?")
- (3) Ability to attend and concentrate (give detailed answers from memory, mental ability required to thread a needle)
 a ☐ b ☐ c ☐ d ☐ e ☐

B. Information processing. Ability to:

- (1) Remember (ability to remember a question before answering; to recall names, relatives, past presidents, and events of the past 24 hours)
 - i. Short-term memory a ☐ b ☐ c ☐ d ☐ e ☐
 - ii. Long-term memory a ☐ b ☐ c ☐ d ☐ e ☐
 - iii. Immediate recall a ☐ b ☐ c ☐ d ☐ e ☐
- (2) Understand and communicate either verbally or otherwise (deficits reflected by inability to comprehend questions, follow instructions, use words correctly, or name objects; use of nonsense words)
 a ☐ b ☐ c ☐ d ☐ e ☐
- (3) Recognize familiar objects and persons (deficits reflected by inability to recognize familiar faces, objects, etc.)
 a ☐ b ☐ c ☐ d ☐ e ☐
- (4) Understand and appreciate quantities (deficits reflected by inability to perform simple calculations)
 a ☐ b ☐ c ☐ d ☐ e ☐
- (5) Reason using abstract concepts. (deficits reflected by inability to grasp abstract aspects of his or her situation or to interpret idiomatic expressions or proverbs)
 a ☐ b ☐ c ☐ d ☐ e ☐
- (6) Plan, organize, and carry out actions (assuming physical ability) in one's own rational self-interest (deficits reflected by inability to break complex tasks down into simple steps and carry them out)
 a ☐ b ☐ c ☐ d ☐ e ☐
- (7) Reason logically.
 a ☐ b ☐ c ☐ d ☐ e ☐

C. Thought disorders

- (1) Severely disorganized thinking (rambling thoughts; nonsensical, incoherent, or nonlinear thinking)
 a ☐ b ☐ c ☐ d ☐ e ☐
- (2) Hallucinations (auditory, visual, olfactory)
 a ☐ b ☐ c ☐ d ☐ e ☐
- (3) Delusions (demonstrably false belief maintained without or against reason or evidence)
 a ☐ b ☐ c ☐ d ☐ e ☐
- (4) Uncontrollable or intrusive thoughts (unwanted compulsive thoughts, compulsive behavior).
 a ☐ b ☐ c ☐ d ☐ e ☐

(Continued on next page)

CONSERVATORSHIP OF THE <input type="checkbox"/> PERSON <input type="checkbox"/> ESTATE OF (Name): _____	CASE NUMBER: _____
<input type="checkbox"/> CONSERVATEE <input type="checkbox"/> PROPOSED CONSERVATEE	

6. (continued)

- D. **Ability to modulate mood and affect.** The (proposed) conservatee ☐ has ☐ does NOT have a pervasive and persistent or recurrent emotional state that appears inappropriate in degree to his or her circumstances. (If so, complete remainder of item 6D.) ☐ I have no opinion.

(Instructions for item 6D: Check the degree of impairment of each inappropriate mood state (if any) as follows: a = mildly inappropriate; b = moderately inappropriate; c = severely inappropriate.)

Anger	a <input type="checkbox"/>	b <input type="checkbox"/>	c <input type="checkbox"/>	Euphoria	a <input type="checkbox"/>	b <input type="checkbox"/>	c <input type="checkbox"/>	Helplessness	a <input type="checkbox"/>	b <input type="checkbox"/>	c <input type="checkbox"/>
Anxiety	a <input type="checkbox"/>	b <input type="checkbox"/>	c <input type="checkbox"/>	Depression	a <input type="checkbox"/>	b <input type="checkbox"/>	c <input type="checkbox"/>	Apathy	a <input type="checkbox"/>	b <input type="checkbox"/>	c <input type="checkbox"/>
Fear	a <input type="checkbox"/>	b <input type="checkbox"/>	c <input type="checkbox"/>	Hopelessness	a <input type="checkbox"/>	b <input type="checkbox"/>	c <input type="checkbox"/>	Indifference	a <input type="checkbox"/>	b <input type="checkbox"/>	c <input type="checkbox"/>
Panic	a <input type="checkbox"/>	b <input type="checkbox"/>	c <input type="checkbox"/>	Despair	a <input type="checkbox"/>	b <input type="checkbox"/>	c <input type="checkbox"/>				

- E. The (proposed) conservatee's periods of impairment from the deficits indicated in items 6A–6D

- (1) ☐ do NOT vary substantially in frequency, severity, or duration.
 (2) ☐ do vary substantially in frequency, severity, or duration (*explain; continue on Attachment 6E if necessary*):

- F. ☐ (Optional) Other information regarding my evaluation of the (proposed) conservatee's mental function (e.g., diagnosis, symptomatology, and other impressions) is ☐ stated below ☐ stated in Attachment 6F.

ABILITY TO CONSENT TO MEDICAL TREATMENT

7. Based on the information above, it is my opinion that the (proposed) conservatee
- a. ☐ has the capacity to give informed consent to any form of medical treatment. This opinion is limited to medical consent capacity.
 - b. ☐ lacks the capacity to give informed consent to any form of medical treatment because he or she is **either** (1) unable to respond knowingly and intelligently regarding medical treatment **or** (2) unable to participate in a treatment decision by means of a rational thought process, **or both**. The deficits in the mental functions described in item 6 above significantly impair the (proposed) conservatee's ability to understand and appreciate the consequences of medical decisions. This opinion is limited to medical consent capacity.

(Declarant must initial here if item 7b applies: _____.)

8. Number of pages attached: _____

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: _____



(TYPE OR PRINT NAME)

(SIGNATURE OF DECLARANT)

When you are appointed by the court as a conservator, you become responsible to the court and assume certain duties and obligations. All of your actions as conservator are subject to review by the court. An attorney is best qualified to advise you about these matters. You should clearly understand the information on this form. You will find additional information in the **Judicial Council *Handbook for Conservators***, which you are required by law to possess.

A conservatee does not lose all rights or all voice in important decisions affecting his or her way of life. All conservatees have the right to be treated with understanding and respect, the right to have their wishes considered, and the right to be well cared for by you. A conservatee generally keeps the right to (1) control his or her own salary, (2) make or change a will, (3) marry, (4) receive personal mail, (5) be represented by a lawyer, (6) ask a judge to change conservators, (7) ask a judge to end the conservatorship, (8) vote, unless a judge decides the conservatee is not capable of exercising this right, (9) control personal spending money, if a judge has authorized an allowance, and (10) make his or her own medical decisions, unless a judge has taken away that right and given it to you. Ask your attorney what rights the conservatee does not have and consult your attorney when you are in doubt.

If the court appoints you as conservator of the person, you will arrange for the conservatee's care and protection, decide where the conservatee will live, and make arrangements for the conservatee's health care, meals, clothing, personal care, housekeeping, transportation, and recreation.

You must assess the conservatee's needs and decide how to meet them.

You may decide where the conservatee will live, but you must choose the "least restrictive," appropriate living situation that is safe and comfortable and allows the conservatee as much independence as possible. You must not move the conservatee from the state or place the conservatee involuntarily in a mental health treatment facility without permission of the court. You must notify the court of each change of the conservatee's address and your address. If you are authorized to place the conservatee in a secure facility because of dementia, you must be sure that the placement is appropriate, meets all special needs, and is the least restrictive.

You are responsible for ensuring that the conservatee's health needs are met. You may not, however, give or withhold consent for medical treatment over the conservatee's objection **unless** the court has given you exclusive authority to consent because the conservatee has lost the ability to make sound medical choices. If you have the authority to approve the use of psychotropic medications to treat dementia and the behaviors associated with it, you should be sure that other, less intrusive treatment options are explored first.

CONSERVATORSHIP OF (Name): 	CASE NUMBER:
CONSERVATEE	

II. CONSERVATOR OF THE PERSON (*continued*)

4. WORK WITH THE CONSERVATOR OF THE ESTATE

If someone else is handling the conservatee's assets, the two of you must work together to be sure the conservatee can afford the care you arrange. Purchases you make for the conservatee must be approved by the conservator of the estate or you may not be reimbursed.

5. CONSULT YOUR ATTORNEY AND OTHER RESOURCES

Your attorney will advise you on your duties, the limits of your authority, the rights of the conservatee, and your dealings with the court. If you have legal questions, check with your attorney, not the court staff. Other questions may be answered better and less expensively by calling on local community resources. (To find these resources, see the *Handbook for Conservators* and the local supplement distributed by the court.)

III. CONSERVATOR OF THE ESTATE

If the court appoints you as conservator of the estate, you will manage the conservatee's finances, protect the conservatee's income and assets, make an inventory of the conservatorship estate's assets, develop a working plan to ensure that the conservatee's needs are met, make sure the conservatee's bills are paid, invest the conservatee's money, see that the conservatee is receiving all the income and benefits he or she is entitled to, ensure that tax returns are filed on time, keep accurate financial records, and regularly report your financial accounts to the court. (Note: The assets and finances of the conservatee are known as "the estate.")

1. MANAGING THE ESTATE'S ASSETS

a. Prudent investments

You must manage the estate assets with the care of a prudent person dealing with someone else's property. This means you must be cautious and you may not make any speculative investments.

b. Keep estate assets separate from anyone else's

You must keep the money and property in this estate separate from anyone else's, including your own. When you open a bank account for the estate, the account name must indicate that it is a *conservatorship* account and not your personal account. Never deposit estate funds in your personal account or otherwise mix them with your or anyone else's property, even for brief periods. Securities in the estate must be held in a name that shows they are estate property and not your personal property.

c. Interest-bearing accounts and other investments

Except for checking accounts intended for ordinary administration expenses, estate accounts must earn interest. You may deposit estate funds in insured accounts in financial institutions, but you should not put more than \$100,000 in one institution. Consult with an attorney before making other kinds of investments.

d. Other restrictions

There are many other restrictions on your authority to deal with estate assets. Without prior order of the court, you may not pay fees to yourself or to your attorney, make a gift of estate assets, or borrow from the estate. If you do not obtain the court's permission when it is required, you may be removed as conservator or you may be required to reimburse the estate from your own personal funds, or both. You should consult with an attorney concerning the legal requirements affecting sales, leases, mortgages, and investments of estate property.

2. INVENTORY OF ESTATE PROPERTY

a. Locate the estate's property

You must locate, take possession of, and protect all the conservatee's income and assets that will be administered in the estate. You should change the ownership of most assets of the conservatorship into the conservatorship estate's name. For real estate, you must record a copy of your *Letters of Conservatorship* with the county recorder in each county where the conservatee owns real property.

b. Determine the value of the property

You must arrange to have a court-appointed referee determine the value of the property unless the appointment is waived by the court. You, rather than the referee, must determine the value of certain "cash items." An attorney can advise you about how to do this.

c. File an inventory and appraisal

Within 90 days after your appointment as conservator, you must file with the court an inventory and appraisal of all the assets in the estate.

CONSERVATORSHIP OF (Name): 	CASE NUMBER:
CONSERVATEE	

III. CONSERVATOR OF THE ESTATE (*continued*)

3. INSURANCE

You should determine that there is appropriate and adequate insurance covering the assets and risks of the estate. Maintain the insurance in force during the entire period of the administration (except for assets after they are sold).

4. RECORD KEEPING

a. Keep an accounting

You must keep complete and accurate records of each financial transaction affecting the estate. The checkbook for the conservatorship checking account is your indispensable tool for keeping records of income and expenditures. You will have to prepare an accounting of all money and property you have received, what you have spent, the date of each transaction, and its purpose. You must describe in detail what you have left after you pay the estate's expenses.

b. Court review of your records

You must file a petition requesting that the court review and approve your accounting one year after your appointment and at least every two years after that. Save your receipts because the court may ask to review them also. If you do not file your accountings as required, the court will order you to do so. You may be removed as conservator if you fail to comply.

5. CONSULTING AN ATTORNEY

Your attorney will advise you and help prepare your inventories, accountings, and petitions to the court. If you have questions, check with your attorney, not the court staff. You should cooperate with your attorney at all times. **When in doubt, contact your attorney.**

IV. DUTY TO DISCLOSE

If you are the spouse of the conservatee, you must disclose to the court the filing of any action or proceeding against the conservatee for (1) legal separation, (2) dissolution of marriage, (3) annulment, or (4) adjudication of nullity of marriage. The disclosure must be made within 10 days of the initial filing of the action or proceeding by filing a notice with the court and serving notice according the Probate Code.

V. LIMITED CONSERVATOR (for the developmentally disabled only)

1. AUTHORITY SPECIFIED IN YOUR LETTERS

If the court appoints you as limited conservator, you will have authority to take care of **only** those aspects of the conservatee's life and financial affairs specified in your *Letters of Conservatorship* and the court's order appointing you. The conservatee retains all other legal and civil rights. Although most of the information provided in this form also applies to limited conservatorships (especially the duties of the conservator of the person), you should clarify with your attorney exactly which information applies in your case.

2. DUTY TO HELP CONSERVATEE DEVELOP SELF-RELIANCE

You must secure treatment, services, and opportunities that will assist the limited conservatee to develop maximum self-reliance and independence. This assistance may include training, education, medical and psychological services, social opportunities, vocational opportunities, and other appropriate help.

VI. TEMPORARY CONSERVATOR

If the court appoints you as temporary conservator, you will generally have the same duties and authority as general conservators **except** the conservatorship will end on the date specified in your *Letters of Temporary Conservatorship*. Most of the information in this form also applies to temporary conservatorships, but you must consult your attorney about which duties you will **not** perform because of the limited time. A temporary conservator should avoid making long-term decisions or changes that could safely wait until a general conservator is appointed. As temporary conservator, you may not move a conservatee from his or her home or sell or give away the conservatee's home or any other assets without court approval.

Sign the *Acknowledgment of Receipt* on page four.

CONSERVATORSHIP OF (Name): <div style="border-bottom: 1px solid black; height: 1.2em; width: 90%; margin-top: 5px;"></div> <div style="text-align: right; margin-top: 10px;">CONSERVATEE</div>	CASE NUMBER: <div style="border-bottom: 1px solid black; height: 1.2em; width: 90%; margin-top: 5px;"></div>
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ACKNOWLEDGMENT OF RECEIPT
of *Duties of Conservator* and *Handbook for Conservators*
(Probate Code, § 1834)

1. I have petitioned the court to be appointed as conservator.
2. I acknowledge that I have received this statement of the duties and liabilities of the office of conservator (*Duties of Conservator* form) and the *Handbook for Conservators* adopted by the Judicial Council.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

	▶	
(TYPE OR PRINT NAME)		(SIGNATURE OF PETITIONER)

Date:

	▶	
(TYPE OR PRINT NAME)		(SIGNATURE OF PETITIONER)

Date:

	▶	
(TYPE OR PRINT NAME)		(SIGNATURE OF PETITIONER)

NOTICE

This statement of duties and liabilities is a summary and is not a complete statement of the law. Your conduct as a conservator is governed by the law itself and not by this summary or by the Judicial Council *Handbook for Conservators*. When in doubt, consult your attorney.

ATTORNEY OR PARTY WITHOUT ATTORNEY <i>(Name, state bar number, and address):</i> <div style="display: flex; justify-content: space-between;"> <div>TELEPHONE NO.:</div> <div>FAX NO. <i>(Optional):</i></div> </div> E-MAIL ADDRESS <i>(Optional):</i> ATTORNEY FOR <i>(Name):</i>	FOR COURT USE ONLY	
SUPERIOR COURT OF CALIFORNIA, COUNTY OF STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:		
CONSERVATORSHIP OF <i>(Name):</i> <div style="text-align: right;">PROPOSED CONSERVATEE</div>		
<div style="text-align: center;"> CONFIDENTIAL SUPPLEMENTAL INFORMATION (Probate Conservatorship) </div> Conservatorship of <input type="checkbox"/> Person <input type="checkbox"/> Estate <input type="checkbox"/> Limited Conservatorship		
1. a. Proposed conservatee <i>(name):</i> b. Date of birth: c. Social security No.:		CASE NUMBER:
2. <input type="checkbox"/> UNABLE TO PROVIDE FOR PERSONAL NEEDS* The following facts support petitioner's allegation that the proposed conservatee is unable to provide properly for his or her needs for physical health, food, clothing, and shelter <i>(specify in detail, enlarging upon the reasons stated in the petition; provide specific examples from the proposed conservatee's daily life showing significant behavior patterns):</i> <input type="checkbox"/> Specified in Attachment 2.		HEARING DATE:
		DEPT.: TIME:

* If this item is not applicable, complete item 8.

CONFIDENTIAL

CONSERVATORSHIP OF (Name):	CASE NUMBER:
PROPOSED CONSERVATEE	

3. ☐ UNABLE TO MANAGE FINANCIAL RESOURCES* The following facts support petitioner's allegation that the proposed conservatee is substantially unable to manage his or her financial resources or to resist fraud or undue influence (*specify in detail, enlarging upon the reasons stated in the petition; provide specific examples from the proposed conservatee's daily life showing significant behavior patterns*): ☐ Specified in Attachment 3.

4. RESIDENCE ("Residence" means the place usually described as "home"; for example, owned real property or long-term rental.)

a. The proposed conservatee is **located** at (*street address, city, state*):

b. The proposed conservatee's **residence** is* ☐ the address in item 4a ☐ other (*street address, city, state*):

c. **Ability to live in residence*** The proposed conservatee is

(1) ☐ **living** in his or her residence and

(a) ☐ will continue to live there unless circumstances change.

(b) ☐ will need to be moved after a conservator is appointed (*specify supporting facts below in item 4c(3)*).

(c) ☐ other (*specify and give supporting facts below in item 4c(3)*).

* If this item is not applicable, complete item 8.

(Continued on page three)

CONFIDENTIAL

CONSERVATORSHIP OF (Name): _____	CASE NUMBER: _____
PROPOSED CONSERVATEE	

4. c. (continued)

- (2) ☐ **not living** in his or her residence and
- (a) ☐ will return by (date): _____ (specify supporting facts below in item 4c(3)).
- (b) ☐ will not return to live there (specify supporting facts below in item 4c(3)).
- (c) ☐ other (specify and give supporting facts below in item 4c(3)).
- (3) ☐ Supporting facts (specify if required): ☐ Specified in Attachment 4c.

5. ALTERNATIVES TO CONSERVATORSHIP* Petitioner has considered the following alternatives to conservatorship and found them to be unsuitable or unavailable to the proposed conservatee (specify the alternatives considered and the reason or reasons each is unsuitable or unavailable): ☐ Reasons specified in Attachment 5.

- a. Voluntary acceptance of informal or formal assistance (give reason this is unsuitable or unavailable):
- b. Special or limited power of attorney (give reason this is unsuitable or unavailable):
- c. General power of attorney (give reason this is unsuitable or unavailable):
- d. Durable power of attorney for ☐ health care ☐ estate management (give reason this is unsuitable or unavailable):
- e. Trust (give reason this is unsuitable or unavailable):
- f. Other alternatives considered (specify and give reason each is unsuitable or unavailable):

6. SERVICES PROVIDED* (complete a or b, or both a and b)

- a. ☐ During the year before this petition was filed,
- (1) **health services** ☐ were provided ☐ were not provided to the proposed conservatee (explain):
☐ Explained in Attachment 6a(1).
- (2) **social services** ☐ were provided ☐ were not provided to the proposed conservatee (explain):
☐ Explained in Attachment 6a(2).

* If this item is not applicable, complete item 8.

(Continued on page four)

CONFIDENTIAL

CONSERVATORSHIP OF (Name): _____	CASE NUMBER: _____
PROPOSED CONSERVATEE	

6. a. (continued)

- (3) **estate management assistance** ☐ was provided ☐ was not provided to the proposed conservatee (explain):
☐ Explained in Attachment 6a(3).

- b. ☐ Petitioner has **no knowledge** of what ☐ social services ☐ health services ☐ estate management assistance was provided to the proposed conservatee during the year before this petition was filed. Petitioner has no reasonable means of determining what services were provided.

7. SUPPORTING FACTS (AFFIDAVITS) The information provided above is stated

- a. Item 1: ☐ on petitioner's own knowledge ☐ in an affidavit (declaration) by another person attached as Attachment 1a.
b. Item 2: ☐ on petitioner's own knowledge ☐ in an affidavit (declaration) by another person attached as Attachment 2a.
c. Item 3: ☐ on petitioner's own knowledge ☐ in an affidavit (declaration) by another person attached as Attachment 3a.
d. Item 4: ☐ on petitioner's own knowledge ☐ in an affidavit (declaration) by another person attached as Attachment 4a.
e. Item 5: ☐ on petitioner's own knowledge ☐ in an affidavit (declaration) by another person attached as Attachment 5a.
f. Item 6: ☐ on petitioner's own knowledge ☐ in an affidavit (declaration) by another person attached as Attachment 6a.

8. ITEMS NOT APPLICABLE The following items on this form were not applicable to the proposed conservatee:

- ☐ 2 ☐ 3 ☐ 4b ☐ 4c ☐ 5 ☐ 6 (specify reasons each item is not applicable):
☐ Reasons specified in Attachment 8.

9. Number of pages attached: _____

DECLARATION

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

(TYPE OR PRINT NAME)



(SIGNATURE OF PETITIONER)

CONFIDENTIAL (DO NOT ATTACH TO PETITION)

GC-314

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar number, and address): TELEPHONE NO.: FAX NO. (Optional): E-MAIL ADDRESS (Optional): ATTORNEY FOR (Name):		FOR COURT USE ONLY	
SUPERIOR COURT OF CALIFORNIA, COUNTY OF STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:			
CONSERVATORSHIP OF (Name): PROPOSED CONSERVATEE		CASE NUMBER:	
CONFIDENTIAL CONSERVATOR SCREENING FORM Conservatorship of <input type="checkbox"/> Person <input type="checkbox"/> Estate <input type="checkbox"/> Limited Conservatorship		HEARING DATE AND TIME:	DEPT.:

The proposed conservator must complete and sign this form. The person requesting appointment of a conservator must submit the completed and signed form to the court with the conservatorship petition.
This form must remain confidential.

How This Form Will Be Used

This form is **confidential** and will not be a part of the public file in this case. Each proposed conservator must complete and sign a separate copy of this form under rule 7.1050 of the California Rules of Court. The information provided in this form will be used by the court and by the persons and agencies designated by the court to assist the court in determining whether to appoint the proposed conservator as conservator. The proposed conservator **must** respond to each item.

1. a. **Proposed conservator (name):**
b. Date of birth:
c. Social security number: d. Driver's license number: State:
e. Telephone numbers: Home: Work: Other:
2. a. ☐ I am related to the proposed conservatee as (specify relationship):
b. ☐ I have personally known the proposed conservatee for: years, months.
3. ☐ I was ☐ I was not nominated as conservator of the ☐ person ☐ estate of the proposed conservatee, by ☐ the proposed conservatee. ☐ the spouse or registered domestic partner of the proposed conservatee. ☐ a parent of the proposed conservatee. (If you checked "I was," provide documentation in Attachment 3.)
4. a. ☐ I am the spouse of the proposed conservatee. ☐ I have ☐ I have not filed for legal separation, dissolution of marriage, annulment, or adjudication of nullity of the marriage. (If you checked "I have," explain in Attachment 4.)
b. ☐ I am not the spouse of the proposed conservatee.
5. a. ☐ I am the registered domestic partner of the proposed conservatee. ☐ I do not ☐ I do intend to terminate my domestic partnership with the proposed conservatee. (If you checked "I do," explain in Attachment 5.)
b. ☐ I am a former domestic partner of the proposed conservatee. My domestic partnership with the proposed conservatee was terminated on (date): . (Explain circumstances in Attachment 5.)
c. ☐ I am neither a current nor former domestic partner of the proposed conservatee.
6. a. ☐ I do ☐ I do not owe money or have a financial obligation to the proposed conservatee. (If you checked "I do," explain in Attachment 6.)
b. The proposed conservatee ☐ does ☐ does not owe money or have a financial obligation to me. (If you checked "does," explain in Attachment 6.)
c. ☐ I am ☐ I am not an agent for a creditor of the proposed conservatee. (If you checked "I am," explain in Attachment 6.)

Page 1 of 2

CONSERVATORSHIP OF <i>(Name):</i> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	CASE NUMBER: <div style="border: 1px solid black; height: 20px; width: 100%;"></div>
PROPOSED CONSERVATEE	

7. ☐ I have ☐ I have not filed for bankruptcy protection within the last 10 years. *(If you checked "I have," explain in Attachment 7.)*
8. ☐ I have ☐ I have not been convicted of a felony or had a felony expunged from my record. *(If you checked "I have," explain in Attachment 8.)*
9. ☐ I have ☐ I have not been charged with, arrested for, or convicted of embezzlement, theft, or any other crime involving the taking of property. *(If you checked "I have," explain in Attachment 9.)*
10. ☐ I have ☐ I have not been charged with, arrested for, or convicted of a crime involving fraud, conspiracy, or misrepresentation of information. *(If you checked "I have," explain in Attachment 10.)*
11. ☐ I have ☐ I have not been charged with, arrested for, or convicted of any form of elder abuse or neglect. *(If you checked "I have," explain in Attachment 11.)*
12. ☐ I have ☐ I have not had a restraining order or protective order filed against me in the last 10 years. *(If you checked "I have," explain in Attachment 12.)*
13. ☐ I am ☐ I am not required to register as a sex offender under California Penal Code section 290. *(If you checked "I am," explain in Attachment 13.)*
14. ☐ I have ☐ I have not previously been appointed conservator, executor, or fiduciary in another proceeding. *(If you checked "I have," explain in Attachment 14.)*
15. ☐ I have ☐ I have not been removed or resigned as a conservator, guardian, executor, or fiduciary in any other case. *(If you checked "I have," explain in Attachment 15.)*
16. ☐ I have or may have ☐ I do not have an adverse interest that the court may consider to be a risk to, or to have an effect on, my ability to faithfully perform the duties of conservator. *(If you checked "I have or may have," explain in Attachment 16.)*
17. ☐ I am ☐ I am not a private professional conservator, as defined in Probate Code section 2341.
 ☐ I have ☐ I have not filed with the court the information statement required by Probate Code section 2342. *(If you checked "I am" and "I have not," explain in Attachment 17.)*
18. ☐ I am ☐ I am not currently registered with the Statewide Registry of Conservators/Guardians/Trustees maintained by the California Department of Justice under Probate Code sections 2850–2855.
 My current registration will expire on *(date):*
 (If you checked "I am not," explain why you are not registered in Attachment 18.)
19. ☐ I am ☐ I am not a responsible corporate officer authorized to act for *(name of corporation):*

 a California nonprofit charitable corporation that meets the requirements for appointment as conservator of the proposed conservatee under Probate Code section 2104. I certify that the corporation's articles of incorporation specifically authorize it to accept appointments as conservator. *(If you checked "I am," explain the circumstances of the corporation's care of, counseling of, or financial assistance to the proposed conservatee in Attachment 19.)*
20. Do you, or does any other person living in your home, have a social worker or parole or probation officer assigned to him or her?
 ☐ Yes ☐ No *(If you checked "Yes," explain in Attachment 20 and provide the name, address, and telephone number of each social worker, parole officer, or probation officer.)*

DECLARATION

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

(TYPE OR PRINT NAME OF PROPOSED CONSERVATOR)	<div style="display: inline-block; width: 20px; height: 20px; background-color: black; transform: rotate(45deg); margin: 0 auto;"></div> (SIGNATURE OF PROPOSED CONSERVATOR)*
--	---

*Each proposed conservator must fill out and file a separate screening form.

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, state bar number, and address): TELEPHONE AND FAX NOS.:	FOR COURT USE ONLY
ATTORNEY FOR (Name): SUPERIOR COURT OF CALIFORNIA, COUNTY OF STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:	
TEMPORARY <input type="checkbox"/> GUARDIANSHIP <input type="checkbox"/> CONSERVATORSHIP OF (Name): <div style="text-align: right;"> <input type="checkbox"/> MINOR <input type="checkbox"/> CONSERVATEE </div>	
PETITION FOR APPOINTMENT OF TEMPORARY <input type="checkbox"/> GUARDIAN <input type="checkbox"/> CONSERVATOR <input type="checkbox"/> Person <input type="checkbox"/> Estate	
CASE NUMBER:	

1. **Petitioner** (name of each):
 a. (Name and address):

requests that

be appointed temporary ☐ guardian ☐ conservator of the PERSON of the
☐ minor ☐ proposed conservatee and *Letters* issue upon qualification.
 b. (Name and address):

be appointed temporary ☐ guardian ☐ conservator of the ESTATE of the
☐ minor ☐ proposed conservatee and *Letters* issue upon qualification.

- c. (1) ☐ bond not be required for the reasons stated in Attachment 1c.
 (2) ☐ \$ bond be fixed. It will be furnished by an admitted surety insurer or as otherwise provided by law.
 (Specify reasons in Attachment 1c if the amount is different from maximum required by Probate Code section 2320.)
 (3) ☐ \$ in deposits in a blocked account be allowed. Receipts will be filed. (Specify institution and location):

- d. ☐ the powers specified in Attachment 1d be granted in addition to the powers provided by law.
 e. ☐ an order be granted dispensing with notice to the ☐ minor ☐ proposed conservatee ☐ minor's mother
☐ minor's father ☐ other person having a visitation order for the reasons stated in Attachment 1e. (Identify each by name and relationship.)
 f. ☐ other orders be granted (specify in Attachment 1f).

2. The ☐ minor ☐ proposed conservatee is (name):
 Present address:

Telephone:

3. The ☐ minor ☐ proposed conservatee requires a temporary ☐ guardian ☐ conservator to ☐ provide for temporary care, maintenance, and support ☐ protect property from loss or injury because (facts are ☐ specified below ☐ specified in Attachment 3):

(Continued on reverse)

TEMPORARY <input type="checkbox"/> GUARDIANSHIP <input type="checkbox"/> CONSERVATORSHIP OF (Name): <div style="text-align: right; padding-right: 50px;"> <input type="checkbox"/> MINOR <input type="checkbox"/> CONSERVATEE </div>	CASE NUMBER:
---	--------------

4. The temporary ☐ guardianship ☐ conservatorship is required
- a. ☐ pending the hearing on the petition for appointment of a general ☐ guardian ☐ conservator.
 - b. ☐ pending the appeal under Probate Code section 2750.
 - c. ☐ during the suspension of powers of the ☐ guardian ☐ conservator.

5. Character and estimated value of the property of the estate:

- a. Personal property: \$
- b. Annual gross income from all sources, including real and personal property, wages, pensions, and public benefits: \$
- Total:** \$

6. ☐ CHANGE OF RESIDENCE OF PROPOSED CONSERVATEE

- a. ☐ Petitioner requests that the residence of the proposed conservatee be changed to (address):

The proposed conservatee will suffer irreparable harm if his or her residence is not changed as requested and no means less restrictive of the proposed conservatee's liberty will suffice to prevent the harm because (precise reasons are ☐ stated below ☐ stated in attachment 6a):

- b. ☐ The proposed conservatee must be removed from the State of California to permit the performance of the following non-psychiatric medical treatment essential to the proposed conservatee's physical survival. The proposed conservatee consents to this medical treatment. (Facts and place of treatment are ☐ specified below ☐ specified in Attachment 6b.)

- c. (Change of residence only) The proposed conservatee

- (1) ☐ will attend the hearing.
- (2) ☐ is able but unwilling to attend the hearing, does not wish to contest the establishment of a conservatorship, does not object to the proposed conservator, and does not prefer that another person act as conservator.
- (3) ☐ is unable to attend the hearing because of medical inability. An affidavit or certificate of a licensed medical practitioner or an accredited religious practitioner is affixed as Attachment 6c.
- (4) ☐ is not the petitioner, is out of state, and will not attend the hearing.

- d. ☐ (Change of residence only) Filed with this petition is a proposed Order Appointing Court Investigator (form GC-330).

7. Petitioner believes the ☐ minor ☐ proposed conservatee ☐ will ☐ will not attend the hearing.

8. Number of pages attached: _____

Date:

*(Signature of petitioner also required (Prob. Code, § 1020).)

 (SIGNATURE OF ATTORNEY *)

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

.....
 (TYPE OR PRINT NAME)

 (SIGNATURE OF PETITIONER)

.....
 (TYPE OR PRINT NAME)

 (SIGNATURE OF PETITIONER)

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, state bar number, and address): ATTORNEY FOR (Name): SUPERIOR COURT OF CALIFORNIA, COUNTY OF STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:	TELEPHONE AND FAX NOS.:	FOR COURT USE ONLY
TEMPORARY <input type="checkbox"/> GUARDIANSHIP <input type="checkbox"/> CONSERVATORSHIP OF THE <input type="checkbox"/> PERSON <input type="checkbox"/> ESTATE OF (Name): <input type="checkbox"/> MINOR <input type="checkbox"/> CONSERVATEE		
ORDER APPOINTING TEMPORARY <input type="checkbox"/> GUARDIAN <input type="checkbox"/> CONSERVATOR	CASE NUMBER:	
WARNING: THIS APPOINTMENT IS NOT EFFECTIVE UNTIL LETTERS HAVE ISSUED.		

1. The petition for appointment of a temporary ☐ guardian ☐ conservator came on for hearing as follows (check boxes c and d to indicate personal presence):
- a. Judge (name):
- b. Hearing date: Time: ☐ Dept.: ☐ Room:
- c. ☐ Petitioner (name):
☐ Attorney for petitioner (name):
- d. ☐ Minor ☐ Conservatee (name):
 Attorney for ☐ minor ☐ conservatee (name):

THE COURT FINDS

2. a. ☐ Notice of time and place of hearing has been given as required by law.
 b. ☐ Notice of time and place of hearing ☐ has been ☐ should be dispensed with for (names):
3. ☐ It is necessary that a temporary ☐ guardian ☐ conservator be appointed to ☐ provide for temporary care, maintenance, and support ☐ protect property from loss or injury.
☐ pending the hearing on the petition for appointment of a general ☐ guardian ☐ conservator.
☐ pending an appeal under Probate Code section 1301.
☐ during the suspension of powers of the ☐ guardian ☐ conservator.
4. ☐ To prevent irreparable harm, the residence of the conservatee must be changed. No means less restrictive of the conservatee's liberty will prevent irreparable harm.
5. ☐ The conservatee must be removed from the State of California to permit the performance of nonpsychiatric medical treatment essential to the conservatee's physical survival. The conservatee consents to this medical treatment.
6. ☐ The conservatee need not attend the hearing on change of residence or removal from the State of California.

THE COURT ORDERS

7. a. (Name):
 (Address): (Telephone):

is appointed temporary ☐ guardian ☐ conservator of the PERSON of
 (name): and Letters shall issue upon qualification

(Continued on reverse)

TEMPORARY <input type="checkbox"/> GUARDIANSHIP <input type="checkbox"/> CONSERVATORSHIP OF (Name): _____ _____ <div style="text-align: right; padding-right: 50px;"><input type="checkbox"/> MINOR <input type="checkbox"/> CONSERVATEE</div>	CASE NUMBER: _____
--	--------------------

7. b. (Name): _____

(Address): _____

(Telephone): _____

is appointed temporary ☐ guardian ☐ conservator of the ESTATE of _____
 (name): _____ and Letters shall issue upon qualification.

8. ☐ Notice of hearing to the persons named in item 2b is dispensed with.

9. a. ☐ Bond is not required.

b. ☐ Bond is fixed at: \$ _____ to be furnished by an authorized surety company or as otherwise provided by law.

c. ☐ Deposits of: \$ _____ are ordered to be placed in a blocked account at (specify institution and location): _____

and receipts shall be filed. No withdrawals shall be made without a court order. ☐ Additional orders in Attachment 9c.
 d. ☐ The temporary ☐ guardian ☐ conservator is not authorized to take possession of money or any other property without a specific court order.

10. ☐ The conservator is authorized to change the residence of the conservatee to (address): _____

11. ☐ The conservator is authorized to remove the conservatee from the State of California to the following address to permit the performance of nonpsychiatric medical treatment essential to the conservatee's physical survival (address): _____

12. ☐ The conservatee need not attend the hearing on change of residence or removal from the State of California.

13. ☐ In addition to the powers granted by law, the temporary conservator is granted other powers. These powers are specified ☐ in Attachment 13 ☐ below (specify): _____

14. ☐ Other orders as specified in Attachment 14 are granted.

15. ☐ Unless modified by further order of the court, this order expires on (date): _____

16. Number of boxes checked in items 8-15: _____

17. Number of pages attached: _____

Date: _____

 JUDGE OF THE SUPERIOR COURT
☐ SIGNATURE FOLLOWS LAST ATTACHMENT

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, state bar number, and address):

After recording return to:

TELEPHONE NO.:

FAX NO. (Optional):

E-MAIL ADDRESS (Optional):

ATTORNEY FOR (Name):

SUPERIOR COURT OF CALIFORNIA, COUNTY OF

STREET ADDRESS:

MAILING ADDRESS:

CITY AND ZIP CODE:

BRANCH NAME:

TEMPORARY ☐ GUARDIANSHIP ☐ CONSERVATORSHIP
OF (Name):☐ MINOR ☐ CONSERVATEE

FOR RECORDER'S USE ONLY

CASE NUMBER:

LETTERS OF TEMPORARY ☐ GUARDIANSHIP ☐ CONSERVATORSHIP
☐ Person ☐ Estate

FOR COURT USE ONLY

LETTERS

1. (Name):

is appointed temporary ☐ guardian ☐ conservator of the ☐ person
☐ estate of (name):2. ☐ Other powers have been granted or restrictions imposed on the temporary
☐ guardian ☐ conservator as ☐ specified below
☐ specified in Attachment 2.3. These *Letters* shall expire

- a.
- ☐
- on (date): or upon earlier issuance of
- Letters*
- to a general
-
- guardian or conservator.
-
- b.
- ☐
- other date (specify):

4. ☐ The temporary ☐ guardian ☐ conservator is not authorized to take possession of money or any other property
without a specific court order.

5. Number of pages attached: _____

WITNESS, clerk of the court, with seal of the court affixed.

(SEAL)

Date:

Clerk, by

(DEPUTY)

AFFIRMATIONI solemnly affirm that I will perform the duties of temporary ☐ guardian ☐ conservator according to law.

Executed on (date):

at (place): , California.

(SEAL)

WITNESS, clerk of the court, with
seal of the court affixed.

Date:

Clerk, by

(DEPUTY)

(SIGNATURE OF APPOINTEE)

CERTIFICATIONI certify that this document and any attachments is a correct copy of
the original on file in my office, and that the *Letters* issued to the
person appointed above have not been revoked, annulled, or set
aside and are still in full force and effect.

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar number, and address): TELEPHONE NO.: _____ FAX NO. (Optional): _____ E-MAIL ADDRESS (Optional): _____ ATTORNEY FOR (Name): _____	FOR COURT USE ONLY
SUPERIOR COURT OF CALIFORNIA, COUNTY OF STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:	
CONSERVATORSHIP OF (Name): _____	
ORDER APPOINTING <input type="checkbox"/> SUCCESSOR PROBATE CONSERVATOR OF THE <input type="checkbox"/> PERSON <input type="checkbox"/> ESTATE <input type="checkbox"/> Limited Conservatorship	CASE NUMBER: _____

WARNING: THIS APPOINTMENT IS NOT EFFECTIVE UNTIL LETTERS HAVE ISSUED.

1. The petition for appointment of ☐ successor conservator came on for hearing as follows
 (check boxes c, d, e, and f or g to indicate personal presence):
 - a. Judicial Officer (name): _____
 - b. Hearing date: _____ Time: _____ ☐ Dept.: _____ ☐ Room: _____
 - c. ☐ Petitioner (name): _____
 - d. ☐ Attorney for petitioner (name): _____
 - e. ☐ Attorney for ☐ person cited ☐ the conservatee on petition to appoint successor conservator:
 (Name): _____ (Telephone): _____
 (Address): _____
 - f. ☐ Person cited was ☐ present. ☐ unable to attend. ☐ able but unwilling to attend. ☐ out of state.
 - g. ☐ The conservatee on petition to appoint successor conservator was ☐ present. ☐ not present.

THE COURT FINDS

2. All notices required by law have been given.
3. (Name): _____
 - a. ☐ is unable properly to provide for his or her personal needs for physical health, food, clothing, or shelter.
 - b. ☐ is substantially unable to manage his or her financial resources or to resist fraud or undue influence.
 - c. ☐ has voluntarily requested appointment of a conservator and good cause has been shown for the appointment.
4. The conservatee
 - a. ☐ is an adult.
 - b. ☐ will be an adult on the effective date of this order.
 - c. ☐ is a married minor.
 - d. ☐ is a minor whose marriage has been dissolved.
5. ☐ There is no form of medical treatment for which the conservatee has the capacity to give an informed consent.
☐ The conservatee is an adherent of a religion defined in Probate Code section 2355(b).
6. ☐ Granting the ☐ successor conservator powers to be exercised independently under Probate Code section 2590 is to the advantage and benefit and in the best interest of the conservatorship estate.
7. ☐ The conservatee is not capable of completing an affidavit of voter registration.
8. ☐ The conservatee has dementia as defined in Probate Code section 2356.5, and the court finds all other facts required to make the orders specified in item 27.

Do NOT use this form for a temporary conservatorship.

CONSERVATORSHIP OF (Name): _____	CASE NUMBER: _____
CONSERVATEE	

9. ☐ Attorney (name): _____ has been appointed by the court as legal counsel to represent the conservatee in these proceedings. The cost for representation is: \$
The conservatee has the ability to pay ☐ all ☐ none ☐ a portion of this sum (specify): \$
10. ☐ The conservatee need not attend the hearing.
11. ☐ The appointed court investigator is (name): _____
(Address and telephone): _____
12. ☐ (For limited conservatorship only) The limited conservatee is developmentally disabled as defined in Probate Code section 1420.
13. ☐ The ☐ successor conservator is a private professional conservator as defined by Probate Code section 2341 who has filed with the court the confidential statement required by Probate Code section 2342.
14. The ☐ successor conservator (check a or b):
- ☐ is currently registered with the Statewide Registry of Private Conservators, Guardians, and Trustees maintained by the California Department of Justice under Probate Code sections 2850–2855.
 - ☐ is exempt from statewide registration under Probate Code sections 2850–2855.
15. (Either a, b, or c must be checked):
- ☐ The ☐ successor conservator is not the spouse of the conservatee.
 - ☐ The ☐ successor conservator is the spouse of the conservatee and is not a party to an action or proceeding against the conservatee for legal separation, dissolution, annulment, or adjudication of nullity of their marriage.
 - ☐ The ☐ successor conservator is the spouse of the conservatee and is a party to an action or proceeding against the conservatee for legal separation, dissolution, annulment, or adjudication of nullity of their marriage. It is in the best interests of the conservatee to appoint the spouse as ☐ successor conservator.
16. (Either a, b, or c must be checked):
- ☐ The ☐ successor conservator is not the domestic partner or former domestic partner of the conservatee.
 - ☐ The ☐ successor conservator is the domestic partner of the conservatee and has neither terminated nor intends to terminate their domestic partnership.
 - ☐ The ☐ successor conservator is the domestic partner or former domestic partner of the conservatee and intends to terminate or has terminated their domestic partnership. It is in the best interest of the conservatee to appoint the domestic partner or former domestic partner as ☐ successor conservator.

THE COURT ORDERS

17. a. (Name): _____ (Telephone): _____
(Address): _____
- is appointed** ☐ successor ☐ conservator ☐ limited conservator of the PERSON of (name): _____
and Letters of Conservatorship shall issue upon qualification.
- b. (Name): _____ (Telephone): _____
(Address): _____
- is appointed** ☐ successor ☐ conservator ☐ limited conservator of the ESTATE of (name): _____
and Letters of Conservatorship shall issue upon qualification.
18. ☐ The conservatee need not attend the hearing.
19. a. ☐ Bond is not required.
- b. ☐ Bond is fixed at: \$ _____ to be furnished by an authorized surety company or as otherwise provided by law.
- c. ☐ Deposits of: \$ _____ are ordered to be placed in a blocked account at (specify institution and location): _____
- and receipts shall be filed. No withdrawals shall be made without a court order.
☐ Additional orders in Attachment 19c.
- d. ☐ The ☐ successor conservator is not authorized to take possession of money or any other property without a specific court order.

CONSERVATORSHIP OF (Name): _____	CASE NUMBER: _____
CONSERVATEE	

20. ☐ For legal services rendered, ☐ conservatee ☐ conservatee's estate ☐ parents of the minor ☐ minor's estate shall pay to (name): _____ the sum of: \$ _____
☐ forthwith ☐ as follows (specify terms, including any combination of payors): _____

- ☐ Continued in Attachment 20.
21. ☐ The conservatee is disqualified from voting.
22. ☐ The conservatee lacks the capacity to give informed consent for medical treatment and the ☐ successor conservator of the person is granted the powers specified in Probate Code section 2355.
☐ The treatment shall be performed by an accredited practitioner of a religion as defined in Probate Code section 2355(b).
23. ☐ The ☐ successor conservator of the estate is granted authorization under Probate Code section 2590 to exercise independently the powers specified in Attachment 23 ☐ subject to the conditions provided.
24. ☐ Orders relating to the capacity of the conservatee under Probate Code sections 1873 or 1901 as specified in Attachment 24 are granted.
25. ☐ Orders relating to the powers and duties of the ☐ successor conservator of the person under Probate Code sections 2351–2358 as specified in Attachment 25 are granted. (*Do not include orders under Probate Code section 2356.5 relating to dementia.*)
26. ☐ Orders relating to the conditions imposed under Probate Code section 2402 on the ☐ successor conservator of the estate as specified in Attachment 26 are granted.
27. ☐ a. ☐ The ☐ successor conservator of the person is granted authority to place the conservatee in a care or nursing facility described in Probate Code section 2356.5(b).
b. ☐ The ☐ successor conservator of the person is granted authority to authorize the administration of medications appropriate for the care and treatment of dementia described in Probate Code section 2356.5(c).
28. ☐ Other orders as specified in Attachment 28 are granted.
29. ☐ The probate referee appointed is (name and address): _____

30. ☐ (*For limited conservatorship only*) Orders relating to the powers and duties of the ☐ successor limited conservator of the person under Probate Code section 2351.5 as specified in Attachment 30 are granted.
31. ☐ (*For limited conservatorship only*) Orders relating to the powers and duties of the ☐ successor limited conservator of the estate under Probate Code section 1830(b) as specified in Attachment 31 are granted.
32. ☐ (*For limited conservatorship only*) Orders limiting the civil and legal rights of the limited conservatee as specified in Attachment 32 are granted.
33. ☐ This order is effective on the ☐ date signed ☐ date minor attains majority (specify): _____
34. Number of boxes checked in items 17–33: _____
35. Number of pages attached: _____

Date: _____

JUDICIAL OFFICER

☐ SIGNATURE FOLLOWS LAST ATTACHMENT

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, state bar number, and address):

☐ After recording return to:

TELEPHONE NO.:

FAX NO. (Optional):

E-MAIL ADDRESS (Optional):

ATTORNEY FOR (Name):

SUPERIOR COURT OF CALIFORNIA, COUNTY OF

STREET ADDRESS:

MAILING ADDRESS:

CITY AND ZIP CODE:

BRANCH NAME:

CONSERVATORSHIP OF (Name):

FOR RECORDER'S USE ONLY

CONSERVATEE

CASE NUMBER:

LETTERS OF CONSERVATORSHIP

☐ Person ☐ Estate ☐ Limited Conservatorship

FOR COURT USE ONLY

1. ☐ (Name): _____ is the appointed
☐ conservator ☐ limited conservator of the ☐ person ☐ estate
of (name): _____
2. ☐ (For conservatorship that was on December 31, 1980, a guardianship of an adult
or of the person of a married minor) (Name): _____
was appointed the guardian of the ☐ person ☐ estate by order
dated (specify): _____ and is now the conservator of
the ☐ person ☐ estate of (name): _____
3. ☐ Other powers have been granted or conditions imposed as follows:
 - a. ☐ Exclusive authority to give consent for and to require the conservatee to
receive medical treatment that the conservator in good faith based on
medical advice determines to be necessary even if the conservatee
objects, subject to the limitations stated in Probate Code section 2356.
(1) ☐ This treatment shall be performed by an accredited practitioner
of the religion whose tenets and practices call for reliance on
prayer alone for healing of which the conservatee was an adherent prior to the establishment of the
conservatorship.
(2) ☐ (If court order limits duration) This medical authority terminates on (date): _____
 - b. ☐ Authority to place conservatee in a care or nursing facility described in Probate Code section 2356.5(b).
 - c. ☐ Authority to authorize the administration of medications appropriate for the care and treatment of dementia described
in Probate Code section 2356.5(c).
 - d. ☐ Powers to be exercised independently under Probate Code section 2590 as specified in Attachment 3d (specify
powers, restrictions, conditions, and limitations).
 - e. ☐ Conditions relating to the care and custody of the property under Probate Code section 2402 as specified in Attach-
ment 3e.
 - f. ☐ Conditions relating to the care, treatment, education, and welfare of the conservatee under Probate Code section
2358 as specified in Attachment 3f.
 - g. ☐ (For limited conservatorship only) Powers of the limited conservator of the person under Probate Code section
2351.5 as specified in Attachment 3g.
 - h. ☐ (For limited conservatorship only) Powers of the limited conservator of the estate under Probate Code section
1830(b) as specified in Attachment 3h.
 - i. ☐ Other (specify): _____

(SEAL)

4. ☐ The conservator is **not** authorized to take possession of money or any other property without a
specific court order.

5. Number of pages attached: _____

WITNESS, clerk of the court, with seal of the court affixed.

Date: _____

Clerk, by _____, Deputy

Page 1 of 2

This form may be recorded as notice of the establishment of a conservatorship of the estate as provided in Probate Code section 1875.

CONSERVATORSHIP OF <i>(Name)</i> : _____	CASE NUMBER: _____
CONSERVATEE	

LETTERS OF CONSERVATORSHIP

AFFIRMATION

I solemnly affirm that I will perform according to law the duties of ☐ conservator ☐ limited conservator.

Executed on *(date)*: _____, at *(place)*: _____



(SIGNATURE OF APPOINTEE)

CERTIFICATION

I certify that this document and any attachments is a correct copy of the original on file in my office, and that the letters issued to the person appointed above have not been revoked, annulled, or set aside, and are still in full force and effect.

Date: _____ Clerk, by _____, Deputy

(SEAL)

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, state bar number, and address): <hr/> TELEPHONE NO.: _____ FAX NO. (Optional): _____ E-MAIL ADDRESS (Optional): _____ ATTORNEY FOR (Name): _____	FOR COURT USE ONLY
SUPERIOR COURT OF CALIFORNIA, COUNTY OF STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:	
ESTATE OF (Name): <div style="display: flex; justify-content: space-around;"> <input type="checkbox"/> DECEDENT <input type="checkbox"/> CONSERVATEE <input type="checkbox"/> MINOR </div>	
<div style="text-align: center;">INVENTORY AND APPRAISAL</div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> Partial No.: <input type="checkbox"/> Final <input type="checkbox"/> Supplemental </div> <div style="width: 45%;"> <input type="checkbox"/> Corrected <input type="checkbox"/> Reappraisal for Sale <input type="checkbox"/> Property Tax Certificate </div> </div>	CASE NUMBER: <hr/> Date of Death of Decedent or of Appointment of Guardian or Conservator:

APPRAISALS

1. Total appraisal by representative, guardian, or conservator (Attachment 1): \$
2. Total appraisal by referee (Attachment 2): \$
- TOTAL: \$**

DECLARATION OF REPRESENTATIVE, GUARDIAN, CONSERVATOR, OR SMALL ESTATE CLAIMANT

3. Attachments 1 and 2 together with all prior inventories filed contain a true statement of
☐ all ☐ a portion of the estate that has come to my knowledge or possession, including particularly all money and all just claims the estate has against me. I have truly, honestly, and impartially appraised to the best of my ability each item set forth in Attachment 1.
4. ☐ No probate referee is required ☐ by order of the court dated (specify):
5. **Property tax certificate.** I certify that the requirements of Revenue and Taxation Code section 480
- a. ☐ are not applicable because the decedent owned no real property in California at the time of death.
- b. ☐ have been satisfied by the filing of a change of ownership statement with the county recorder or assessor of each county in California in which the decedent owned property at the time of death.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

(TYPE OR PRINT NAME; INCLUDE TITLE IF CORPORATE OFFICER)		(SIGNATURE)
--	--	-------------

STATEMENT ABOUT THE BOND

(Complete in all cases. Must be signed by attorney for fiduciary, or by fiduciary without an attorney.)

6. ☐ Bond is waived, or the sole fiduciary is a corporate fiduciary or an exempt government agency.
7. ☐ Bond filed in the amount of: \$ ☐ Sufficient ☐ Insufficient
8. ☐ Receipts for: \$ _____ have been filed with the court for deposits in a blocked account at (specify institution and location):

Date:

(TYPE OR PRINT NAME)		(SIGNATURE OF ATTORNEY OR PARTY WITHOUT ATTORNEY)
----------------------	--	---

ESTATE OF (Name): <div style="border-bottom: 1px solid black; height: 1.2em; margin-top: 5px;"></div> <div style="display: flex; justify-content: space-around; margin-top: 5px;"> <input type="checkbox"/> DECEDENT <input type="checkbox"/> CONSERVATEE <input type="checkbox"/> MINOR </div>	CASE NUMBER: <div style="border-bottom: 1px solid black; height: 1.2em; margin-top: 5px;"></div>
--	---

DECLARATION OF PROBATE REFEREE

9. I have truly, honestly, and impartially appraised to the best of my ability each item set forth in Attachment 2.
10. A true account of my commission and expenses actually and necessarily incurred pursuant to my appointment is:

Statutory commission: \$

Expenses (*specify*): \$

TOTAL: \$

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

<div style="display: flex; align-items: center; justify-content: center;"> <div style="border-bottom: 1px solid black; width: 100%;"></div> <div style="margin: 0 10px;">▶</div> <div style="border-bottom: 1px solid black; width: 100%;"></div> </div>	<div style="border-bottom: 1px solid black; width: 100%;"></div>
(TYPE OR PRINT NAME)	(SIGNATURE OF REFEREE)

INSTRUCTIONS

(See Probate Code sections 2610-2616, 8801, 8804, 8852, 8905, 8960, 8961, and 8963 for additional instructions.)

1. See Probate Code section 8850 for items to be included in the inventory.
2. If the minor or conservatee is or has been during the guardianship or conservatorship confined in a state hospital under the jurisdiction of the State Department of Mental Health or the State Department of Developmental Services, mail a copy to the director of the appropriate department in Sacramento. (Prob. Code, § 2611.)
3. The representative, guardian, conservator, or small estate claimant shall list on Attachment 1 and appraise as of the date of death of the decedent or the date of appointment of the guardian or conservator, at fair market value, moneys, currency, cash items, bank accounts and amounts on deposit with each financial institution (as defined in Probate Code section 40), and the proceeds of life and accident insurance policies and retirement plans payable upon death in lump sum amounts to the estate, except items whose fair market value is, in the opinion of the representative, an amount different from the ostensible value or specified amount.
4. The representative, guardian, conservator, or small estate claimant shall list in Attachment 2 all other assets of the estate which shall be appraised by the referee.
5. If joint tenancy and other assets are listed for appraisal purposes only and not as part of the probate estate, they must be separately listed on additional attachments and their value excluded from the total valuation of Attachments 1 and 2.
6. Each attachment should conform to the format approved by the Judicial Council. (See *Inventory and Appraisal Attachment* (form DE-161/GC-041) and Cal. Rules of Court, rule 201.)

